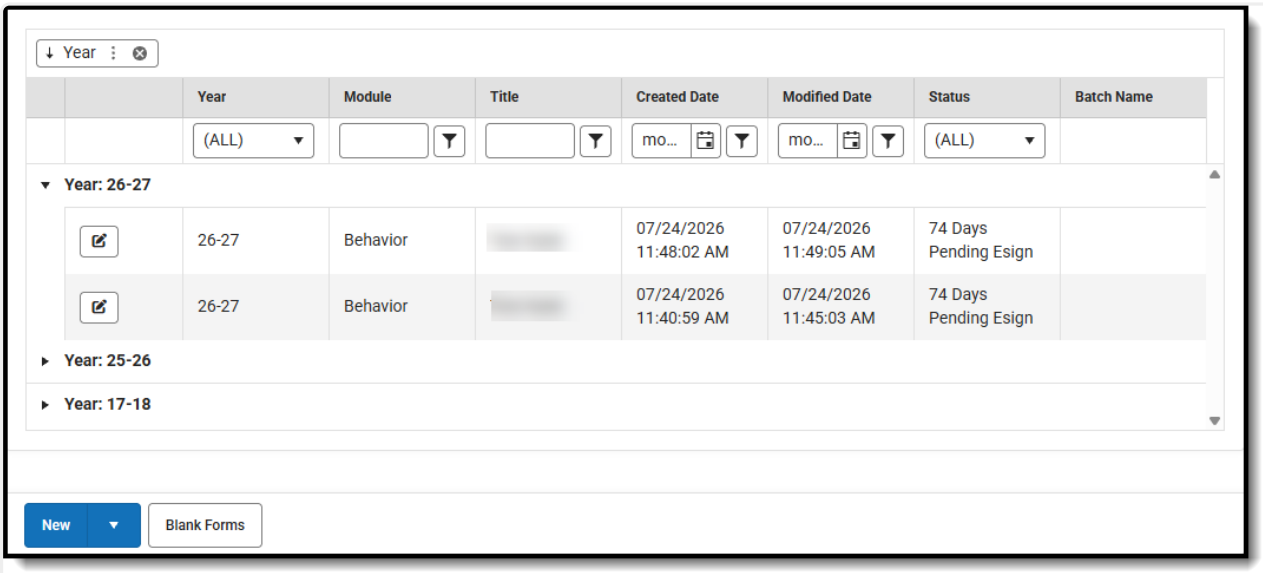
Forms

Last Modified on 10/15/2026 9:05 am CDT

The Forms tool stores and manages all Custom Forms attached to a student. Custom Forms added and edited using the module-specific Documents tools display in the Forms tool.



Forms List Screen

Only Custom Forms display in the Forms tool. See the Documents tool documentation for information about the document types available in each module:

- Counseling
- Health
- PLP
- Response to Intervention
- Special Ed

See the Forms Tool Rights article for information about rights needed to use this tool.

List Screen

The List Screen displays all existing Custom Forms attached to a student. By default, all existing Custom Forms are **sorted** by Year, with the most current year at the top. Drag column headers to

the top of the screen to further sort. Forms can also be sorted by clicking on the column headers.

Enter text into the fields below the header or select values in the dropdowns to **filter** the list of Forms. The funnel icon provides additional filtering options. Custom forms can be filtered by Year, Module, Title, Created Date, Modified Date, and/or Status.

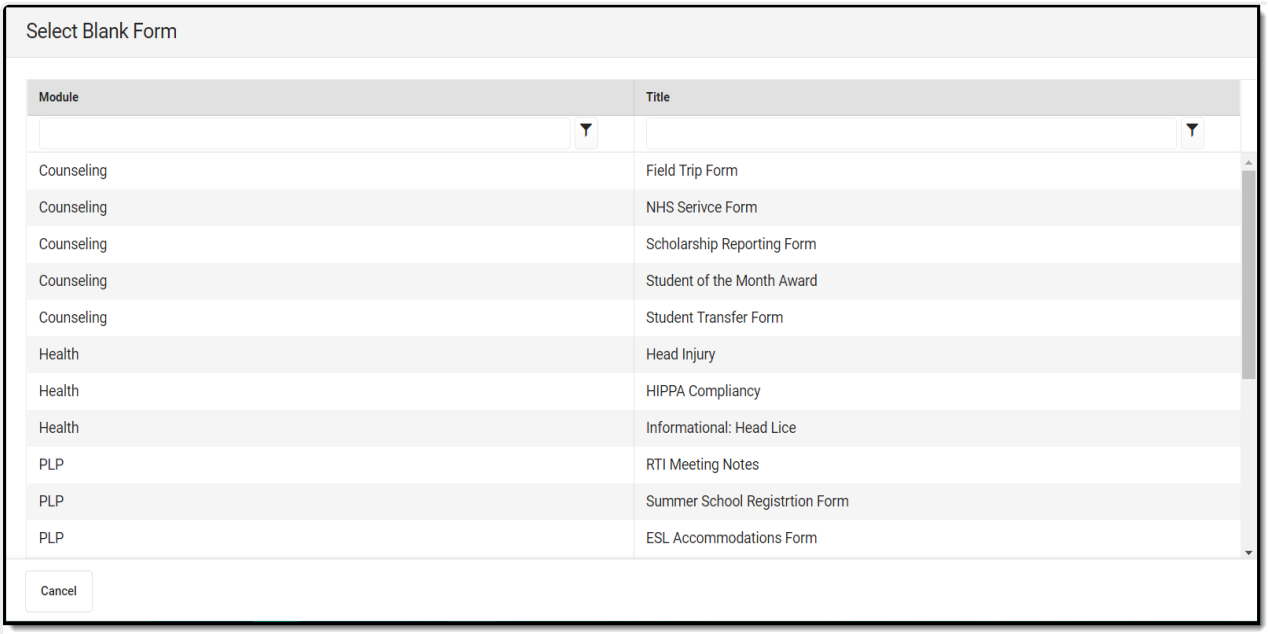
Column Header	Description
Year	The year in which the form is organized. When the form needs to be organized into a different year, click the **edit** button . Select a year from the **dropdown** and then click the **save** button or the **cancel** button to go back.  *In Line School Editing* The year cannot be modified for batch-created forms.
Module	The module in which the form is organized.
Title	The name of the form.
Created Date	The date the form was created for the student.
Modified Date	The date the form was last edited.
Status	The state of the form. Statuses include: **Non-eSignature Form Statuses** **Action Required:** • **Draft**: The form contains errors that must be corrected before completion. **Unlocked:** • **Unlocked**: The form contains no errors. **Locked**: • **Locked**: The form is complete and locked. No further edits can be made. • **Locked and Published**: The form is complete and is available for parent/guardian(s) and/or students to view on the Campus Parent and/or Student Portal. No further edits can be made. • **Locked and Pending Publish**: The form is complete and will be published to the Portal on a future date.

Column Header	Description
	eSignature Form Statuses **Action Required**: • **Draft**: The form contains errors that must be corrected before completion. • **Declined Terms and Conditions**: One or more guardian(s) declined the terms and conditions. • **eSigned**: Indicates all signatures are collected and the form is ready to be completed. • **Expired**: The End Date of the form has passed. • **No Participants**: There are no active Portal accounts. • **Requesting eSignature**: The form is set up for eSignature, assigned to a student, and has not yet been sent for eSignature. **Pending eSignature:** • **Pending eSign**: The signature request was sent to the Portal and is awaiting eSignature. • **Pending eSign (Future)**: The form will be sent to the Portal for eSignature on a future date. **Unlocked:** • **Unlocked**: The user has confirmed there are no participants. The form is read-only on the Portal. When the form has no participants, the user can contact their administrator to update Census information, or confirm there are no participants by selecting the individual form and selecting Review Participants > Confirm No Participants. The form becomes read-only. **Locked**: • **Locked and Signed**: The form is complete, and all participants have signed the document. No further edits can be made. • **Locked and Declined**: The form is complete, and a participant declined the document. No further edits can be made. • **Locked and Overridden**: The form is complete, and the user has overridden at least one signature. No further edits can be made.
Batch Name	Indicates the form was created with the Custom Form Batch Setup tool. Batch-created forms CANNOT be deleted from the Forms tool.

Blank Forms

Blank forms are print only versions of district or state-defined forms. Blank Forms are uploaded to Campus in the Custom Forms area of System Administration.

Click the Blank Form button Blank Forms to view all the Blank Forms available to print.



Select Blank Form List Screen

Click the print icon at the top of the PDF menu to print. Printing through the browser (File > Print, etc.) prints the Index, not the form itself.



Print Blank Form

Interactive Forms

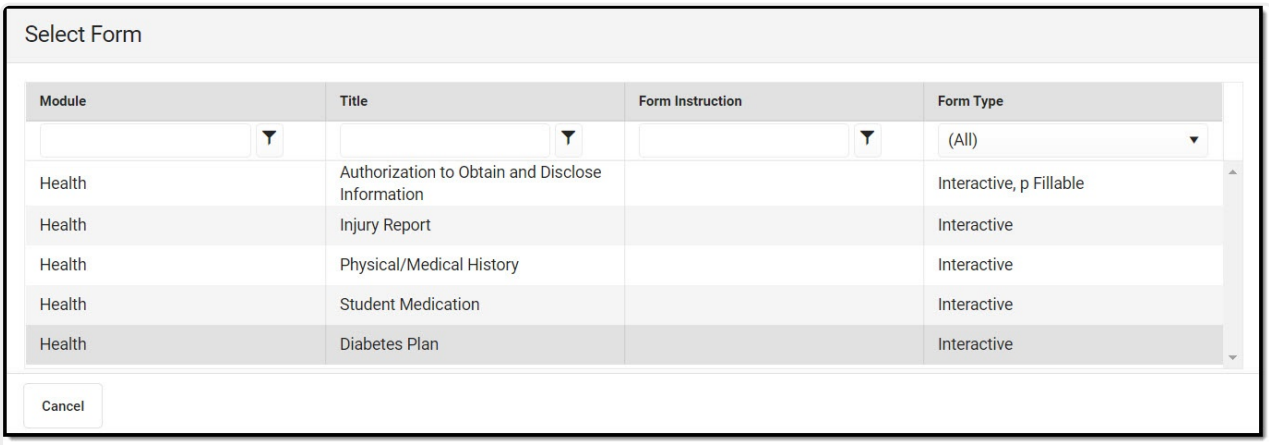
Interactive Custom Forms are editable documents that supplement those linked to a person's record. To create a new Custom Form, click the **New** button 

. The **Select Form** screen displays all available active forms.

See the Custom Forms tool for information on setting up each Form type. Other options for forms that can be created using the Forms tool include:

Form Type	Description
Interactive	• Displays on Forms tool • Teacher/user can fill out the form
Interactive, Portal	• Displays on Forms tool • Teacher/user can fill out the form • Read-only on Portal
Interactive, eSign	• Displays on Forms tool • Teacher/user can fill out the form • Parent/guardian and/or student can sign the form via the Portal
Interactive, p Fillable	• Displays on Forms tool • Teacher/user can fill out the form • Parent/guardian and/or student can sign the form via the Portal • Parent/guardian and/or student can fill out the form
Interactive with DB Table	• Creates a database table where data can be queried and reported in Ad hoc • Displays on Forms tool • Teacher/user can fill out the form
Interactive with DB Table, Portal	• Creates a database table where data can be queried and reported in Ad hoc • Displays on Forms tool • Teacher/user can fill out the form • Read-only on Portal
Interactive with DB Table, eSign	• Creates a database table where data can be queried and reported in Ad hoc • Displays on Forms tool • Teacher/user can fill out the form • Parent/guardian and/or student can sign the form via the Portal

Form Type	Description
Interactive with DB Table, p Fillable	• Creates a database table where data can be queried and reported in Ad hoc • Displays on Forms tool • Teacher/user can fill out the form • Parent/guardian and/or student can sign the form via the Portal • Parent/guardian and/or student can fill out the form



Select Form

Select Prepopulation Data

The content of existing custom forms associated with a person will not change when an Administrator changes Ad Hoc mappings on the form in System Administration. See the Custom Forms article for additional information.

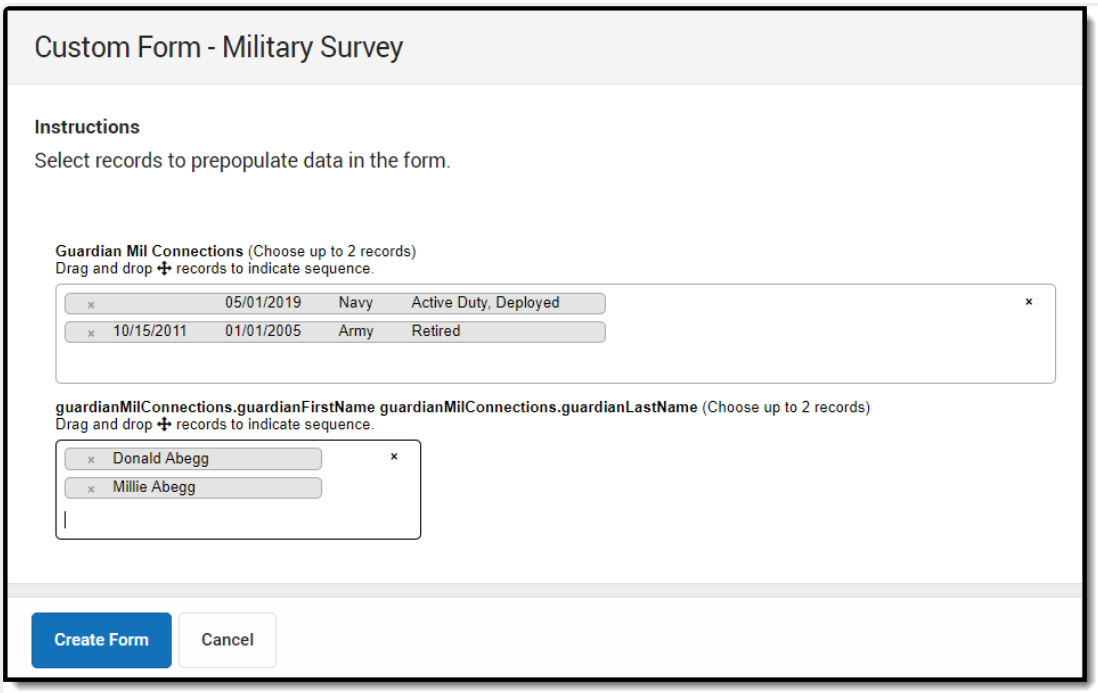
When setting up a Custom Form, form administrators can map Ad hoc fields to editable fields in the form. These mapped fields populate based on the person's data to which the form is attached.

Forms may include multiple fields mapped to the same Ad hoc field, such as reporting a list of team members or behavior events. Sequence values are selected for fields in a list when the form is created in System Administration. The user creating the form then indicates the order in which records should populate the form. This process is best illustrated with an example.

Military Connection Example

An example form includes a list of a person's team members. When mapping Ad hoc fields to the form, the form administrator aligned guardianMilConnections.guardianFirstName and guardianMilConnections.guardianLastName to two fields in a list, with Sequences of 1 and 2. When a user selects the form to add to a person, the first step is to select which records populate in these

fields and in what order. Select records from the dropdown list and reorder them as desired by clicking and dragging records.



Select Records to Prepopulate Data in the Form

Multiple Guardians and/or Address Selection

When students have multiple guardians and/or addresses, users can select which guardian or address populates from a dropdown. The following Ad hoc fields allow for this selection:

- guardians.personID
- guardians.guardianFirstName
- guardians.guardianLastName
- guardians.guardianFirstLastName
- guardians.guardianAddress

After making all selections, click the **Create Form** button. The selected records display in the indicated order in the form.

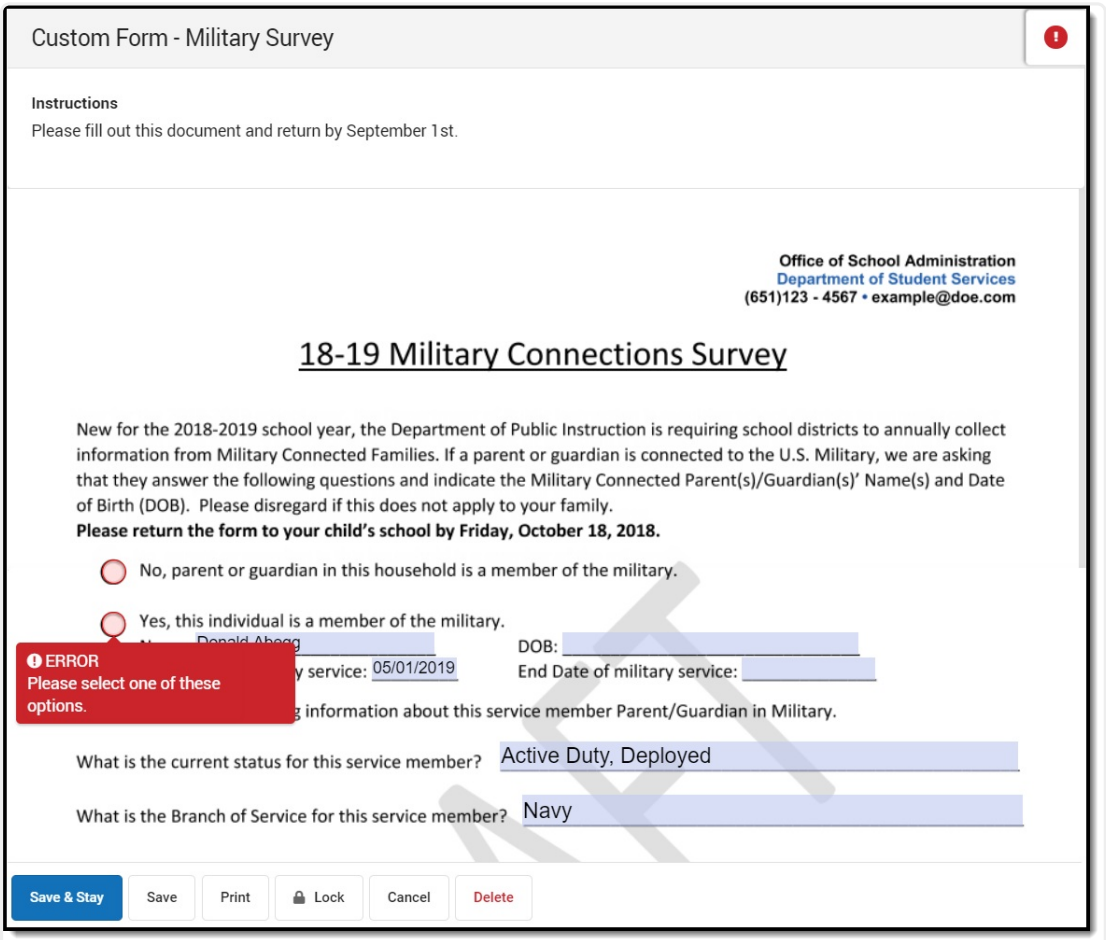
Complete Form

The **Name** and the **Instructions** display at the top of the form. The header also indicates the form displays on Roster and/or Portal or sent to the parent/guardian and/or student for eSignature and data entry.

A warning icon displays in the upper right corner when errors occur, such as missing required fields or overfilled fields. Click this button to navigate through the errors on the form. An unlocked

icon displays when there are no errors, and the form is unlocked. A locked icon displays when there are no errors, and the form is locked.

A draft of the form can be saved with rule errors. However, a document draft will not save when there are overfilled fields.



Example Custom Form with Errors

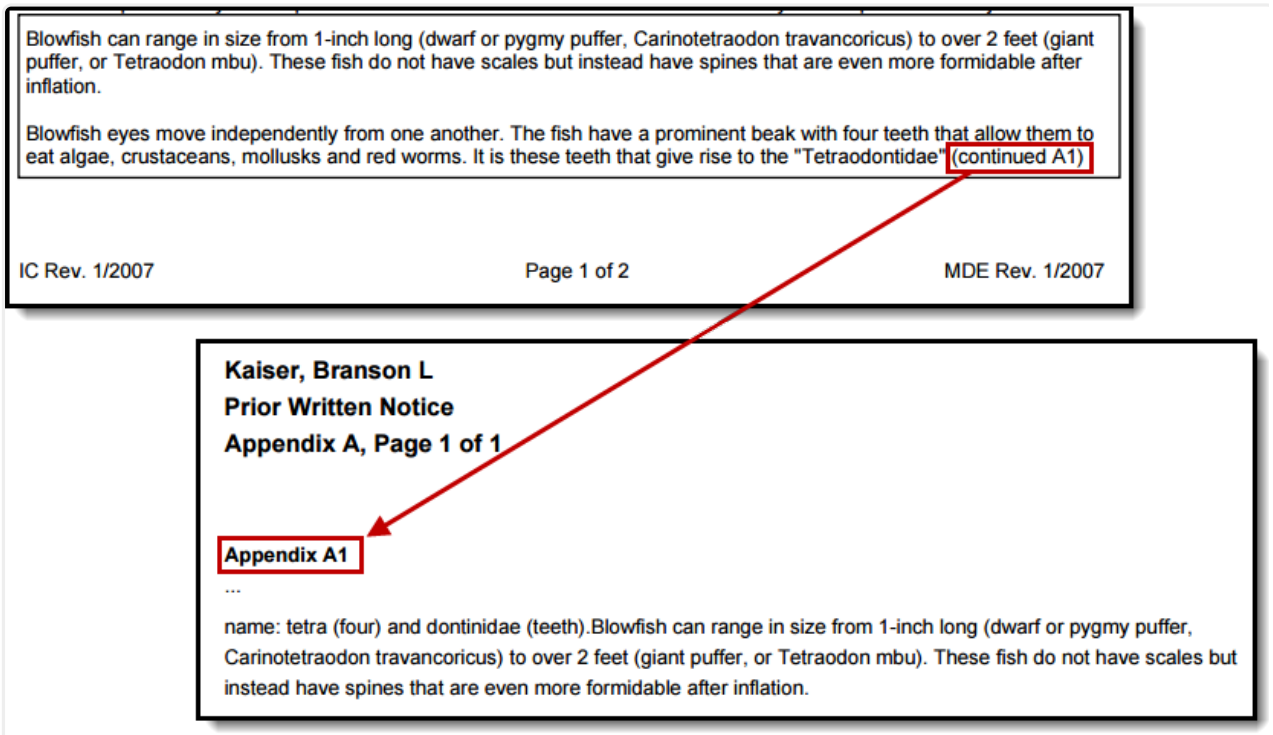
Enter and/or select data in the form as needed. Click **Save & Stay** to save progress and continue working on the form or **Save** to save progress and navigate to the list screen. Or, click **Cancel.**

Print

When text entered in a multiline text field on a custom form goes beyond the capacity of space on the page, the overflow text displays on subsequent pages when the form is printed. The text on one page ends with the word **Continued** and a **Letter-Number** combination in parentheses, which indicates where the text is continued on another page. See the Custom Forms article for additional information concerning the overflow functionality.

For example, a text field ends with "Continued A1," the text is continued on an overflow page

labeled **Appendix A1** (see image 8 below). The ellipsis (...) under the Appendix label indicates the text is continued from a previous page.



Overflow Print Example

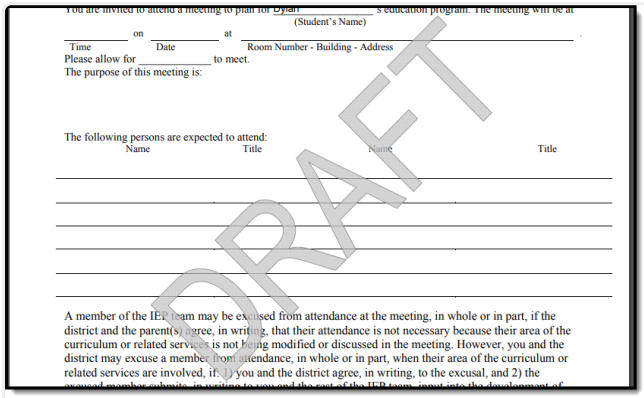
The maximum capacity for each overflow text field is 1 MB, with a maximum of 4 MB per form.

Overflow Setup

When creating the form in Adobe, the multiline option must be selected under Text Field Properties. The Overflow checkbox must also be marked in System Administration. See the Custom Forms documentation to learn about Custom Form setup.

Print Draft Custom Forms

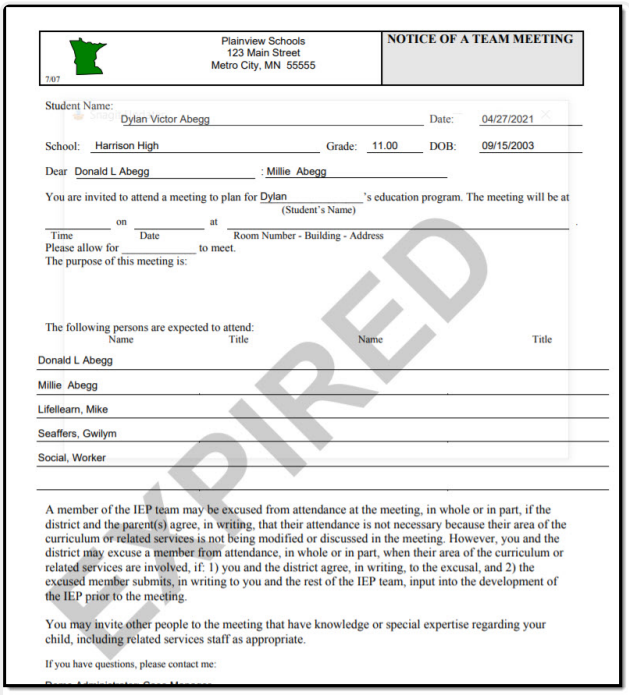
A Draft watermark displays when printing Custom Forms in a draft status.



Draft Custom Form

Print Expired Custom Forms

An Expired watermark displays when printing Custom Forms in an Expired status.



Expired Custom Form

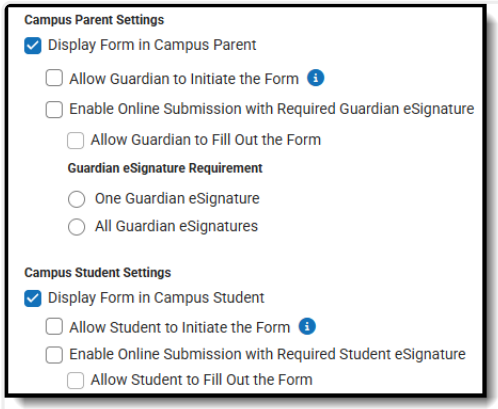
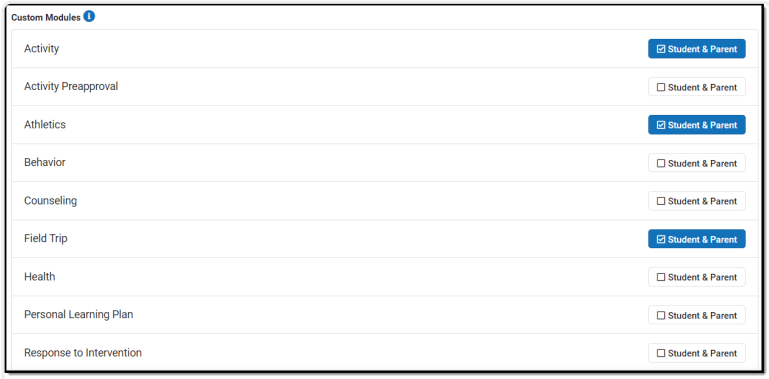
Lock/Unlock

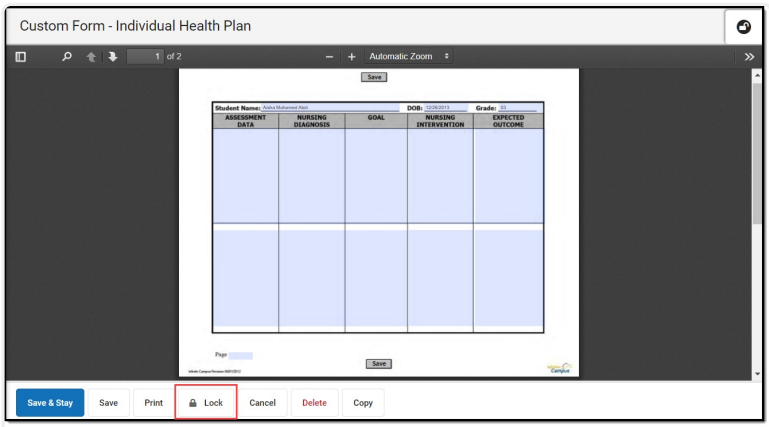
The Lock and Unlock buttons do not display for Custom Forms that are eSignature Requests. See the Review Participants section for additional information.

Users can click the **Lock** Lock **or Unlock** Unlock button to change the lock status of the

document. A locked document indicates no additional changes can be made. Before locking or unlocking, a validation message displays, alerting the user to the logic associated with locking a form.

Certain read-only Custom Forms display on Campus Parent and/or Campus Student Portal once the form is locked. Three conditions must happen in order for a Custom Form to display on the portal:

Step	Image *Click to Enlarge*
1. On the Custom Forms Upload step, mark the **Display Form in Campus Parent**.	 *Display Custom Form on Portal Options*
2. Mark the Portal Preference for the module the form is in at System Administration > Portal > Preferences > Display Options on the Documents section. Portal preferences are set by school. See the Portal Preferences Display Options documentation for additional information.	 *Display Options for Custom Modules*

Step	Image *Click to Enlarge*
3. Attach the Custom Form to a student and lock the document (either on the Forms tool or the Documents tool).	 *Lock a Custom Form*

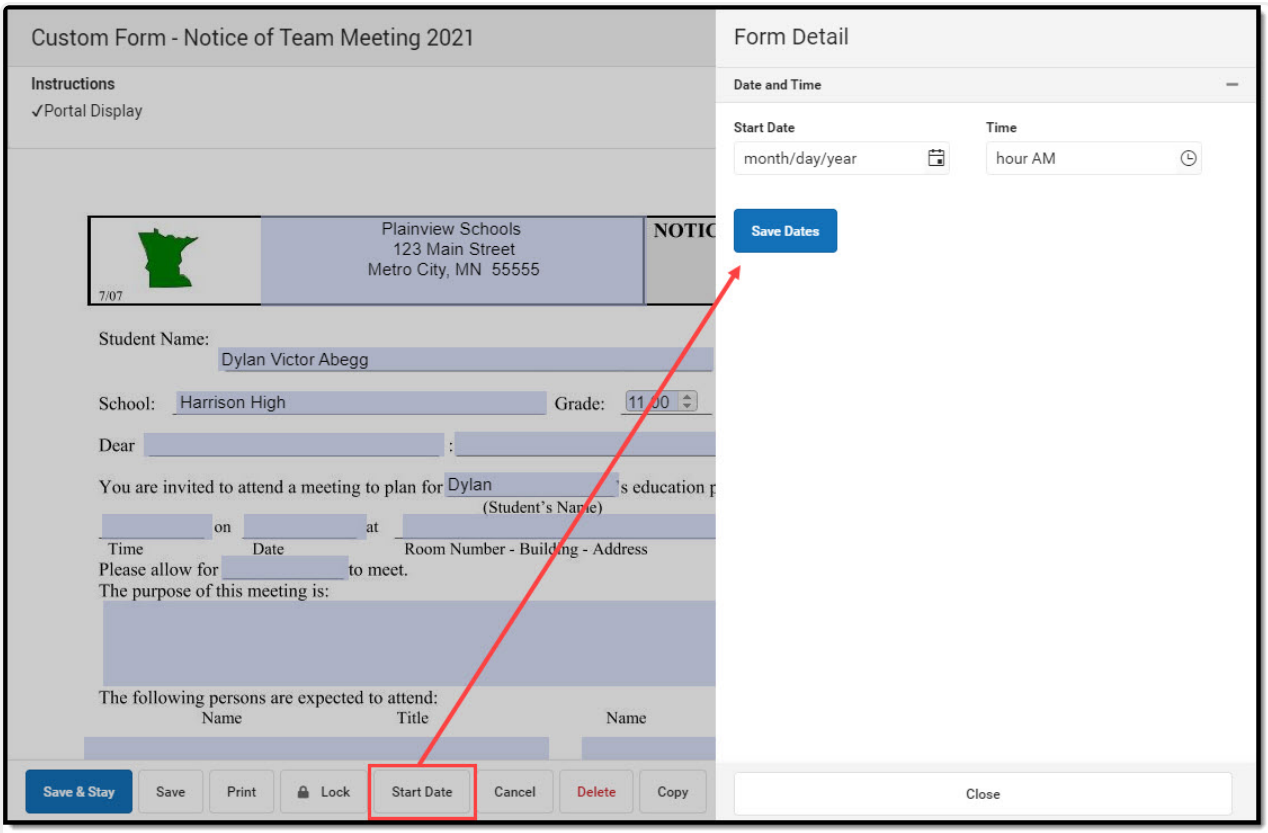
When a form is locked and published, its status on the Forms list screen displays as **Locked & Published**. Hover over the locked icon within the form to view a message that the form is locked and published.

The ability to lock a document is given when the user has **W**rite rights to the Forms tool. The ability to unlock a document requires **RWAD** rights to Student Information > General > Forms > Module > Unlock AND **W**rite rights to the Forms tool (Student Information > General > Forms). See the Forms Tool Rights documentation for additional information.

Optional Start Date and Time

A Start Date and Time can be set for Forms that are sent to the Campus Parent and/or Campus Student in the future. So when the above conditions have been met concerning the Portal setup, the Form is Locked, and a Start Date and Time are set; the Form is published to the Portal as of the Start Date and Time.

The **Start Date** button does not display when the school's Portal Display Options are not set.



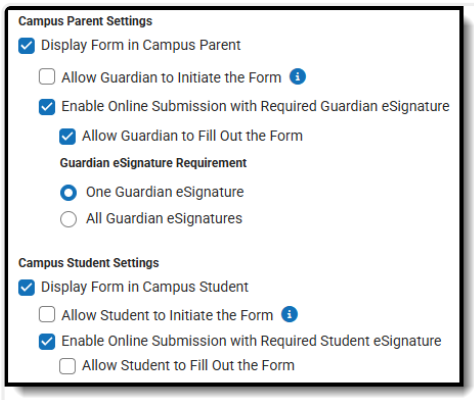
Portal Start Date and Time

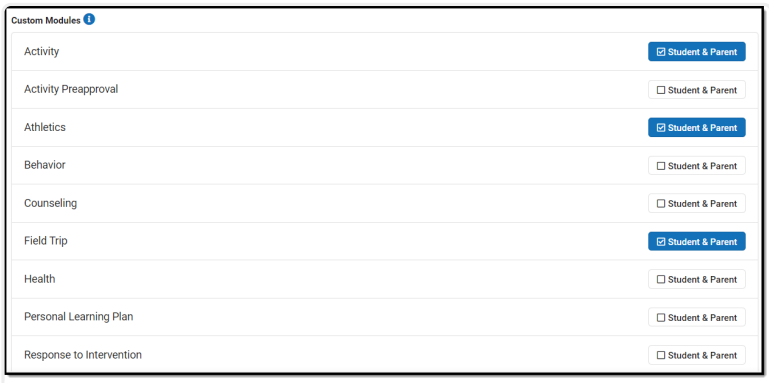
Custom Form eSignatures

When the Request Parent/Guardian and/or Student Signature option is selected on the Custom Forms Setup tool, this form is sent to parent/guardian(s) and/or the student for an electronic signature (eSignature). Note that certain forms allow the parent/guardian and/or the student to enter data.

Note: eSignature Custom Forms do not sync to the state for State Edition users. Custom Forms with eSignatures ONLY display on the Forms tool and are not available on the Documents tool.

For an eSignature Request/Fillable form to be sent to the Campus Parent or Campus Student Portal, the following conditions must be met:

Step	Image *Click to enlarge*
1. On the Custom Forms Upload step, mark the **Display Form in Campus Parent** and/or the **Display Form in Campus Student** and the **Enable Online Submission with Required eSignature** options. The number of eSignatures required can be determined by selecting one of the following options: • **One Guardian eSignature** - Only one guardian signature is required for a staff member to complete the form. When multiple guardians exist for a student, staff can select which guardian receives the form from the Forms tool. When assigning forms via the Custom Form Batch Setup tool, the form is sent to all guardians for the student, and the first guardian to sign the form locks out the other guardian from signing the form. • **All Guardian eSignatures** - All student guardians must sign the form for staff to complete it.	 *Display Custom Form on Portal Options*

Step	Image *Click to enlarge*
2. Mark the Portal Preference for the Module the form is in at System Administration > Portal > Preferences > Display Options in the Documents section. Portal preferences are set by school. See the Portal Preferences Display Options documentation for additional information.	 *Display Options for Custom Modules*
3. Save the Custom Form for a student and click the Request eSignatures button. Requesting eSignatures makes the form read-only. You will not be able to make additional changes after requesting signatures.	 *Request eSignatures Button*
4. Parent/Guardian(s) receive the eSignature request(s) when the **Guardian, Mailing,** and **Portal** checkboxes are marked on the Relationships tool for the student. The Parent/Guardian must have a valid Portal account in order to receive eSignature forms. The order of the Parent/Guardian(s) names is determined first by the **Emergency Priority** on the Relationships tool. When no Emergency Priority is entered, the names display in alphabetical order.	 *Relationship Checkboxes for eSignature*

Review Participants

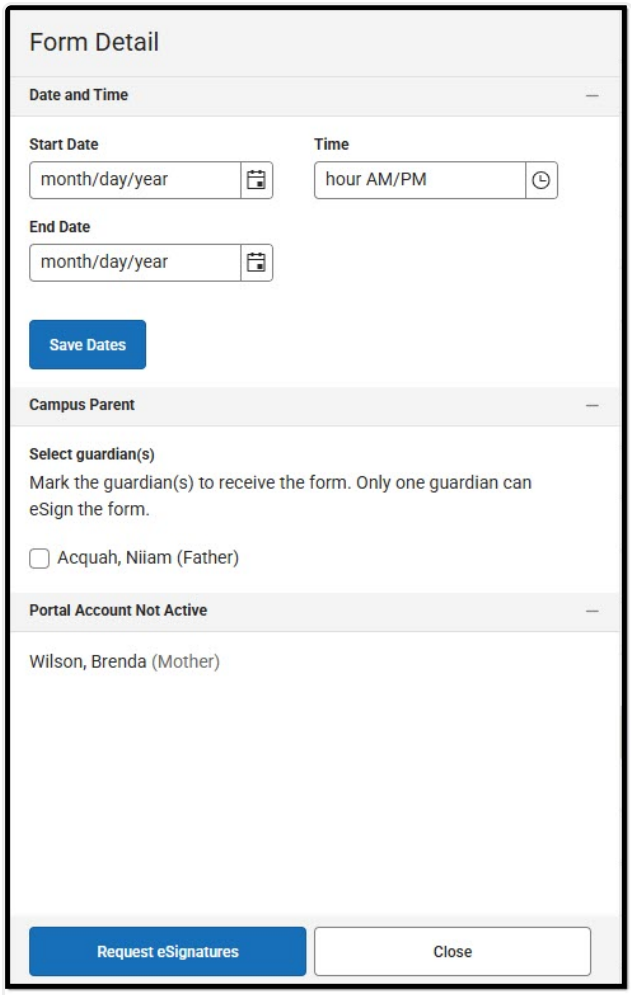
Forms support emancipated student functionality. When a form is marked to be sent to the Parent Portal, emancipated students receive it via the Parent Portal. See the Emancipated Students documentation for information on setting up emancipated students.

The **Review Participants** button displays after an initial save. When finished entering data into the form, click the **Review Participants** button to verify to whom the form is being sent and send eSignature request(s). The Form Detail also allows the user to select when the Form is sent (**Start Date** and **Time**) and when it becomes read-only on the Portal (**End Date**).

When multiple guardians exist for a student, and only one signature is required, staff can select which guardian(s) receives the form. Staff can send the form to multiple guardians, but whichever guardian signs the form first prevents the other guardian(s) from signing. The other guardian(s) can still view the form. See the Custom Forms Setup tool article for information about the guardian requirement settings.

Guardian(s) without active portal accounts display in the **Portal Account Not Active** section.

The **Review Participants** button does not display when the school's Portal Display Options are not set.



Review Participants Side Panel

Request eSignature(s) Process

1. Enter data into the form.
2. Click **Review Participants.**
3. Optional: Select a **Start Date** and **Time** when the form is available on the Portal, after eSignatures have been requested.
4. Optional: Select an **End Date** when the form becomes read-only on the Portal.
5. When multiple guardians exist and only one signature is required, select which guardian to receive the form. When all guardian signatures are required, no guardian selection can be made.
6. Click **Request eSignatures** or **Cancel**. Requesting eSignatures makes the form read-only. You are not able to make additional changes after requesting signatures.

Note: The End Date field can be changed, even after the form is Expired. The Start Date and Time CANNOT be changed once the eSignature(s) is requested.

After the eSignature Request(s) have been sent, the **Review Participants** button can be used to

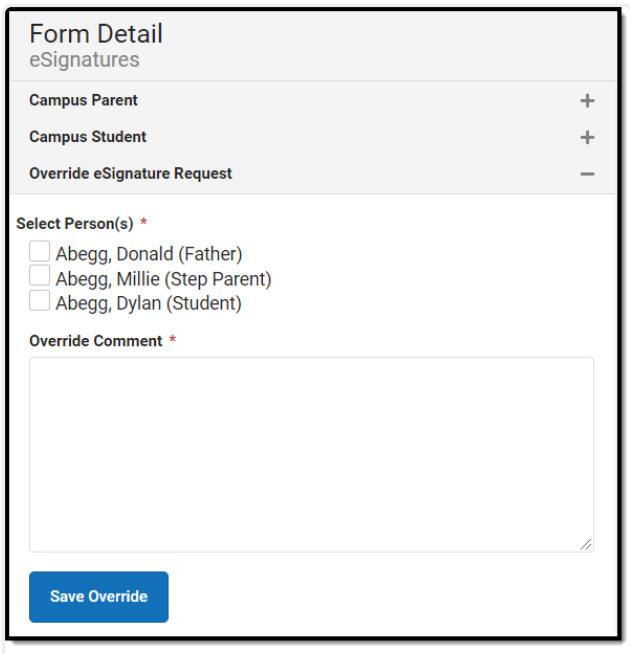
see the status per person and override eSignatures and/or enter a contact log record. Statuses include:

- **Signed**: The person signed the form.
- **Declined**: The person declined the form.
- **Pending**: The form is awaiting action by the person.
- **In Progress**: The person is currently editing the form. When a person has an In Progress status, their signature cannot be overridden.
- **Overridden**: The teacher has overridden that person's signature.
- **Declined Terms**: The participant declined the Terms and Conditions.

Override eSignature Request(s)

The Override eSignature Request option forces the eSignature to be signed so the form can be completed. This option can be used when for any reason a parent/guardian or student is unable to eSign or a paper form is signed and submitted instead of the virtual form.

> Overriding eSignatures requires a separate tool right. See the Forms Tool Rights article for additional information.

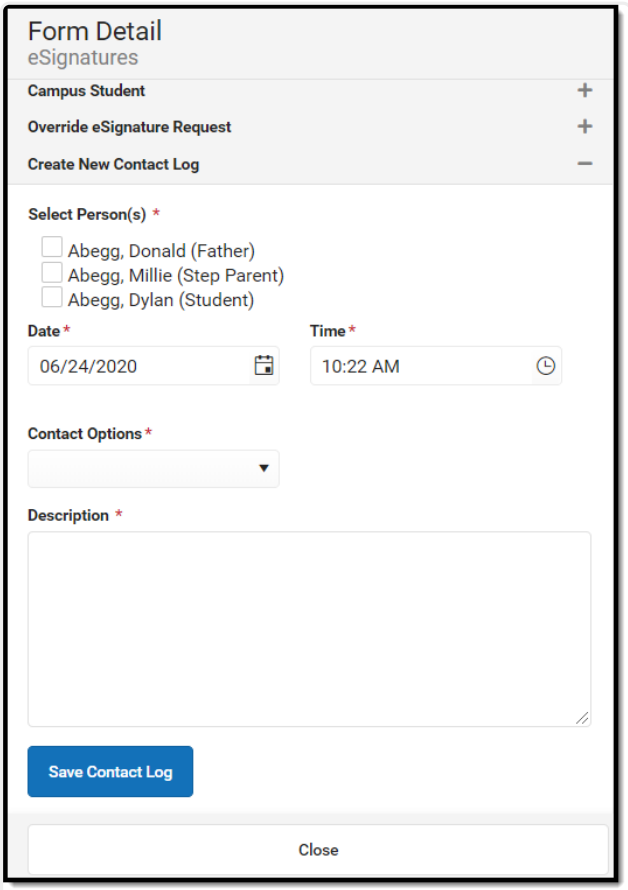


Override eSignature Request

1. Click **Review Participants** after the eSignature request(s) have been sent.
2. Mark the checkbox for the person whose signature is to be overridden.
3. Enter an **Override Comment.**
4. Click **Save Override.** The Status of this form after the user **Completes** the form is Locked & Overridden.

eSignature Contact Log

The Custom Forms Contact Log is used to document any interactions between the participants of the Custom Form.



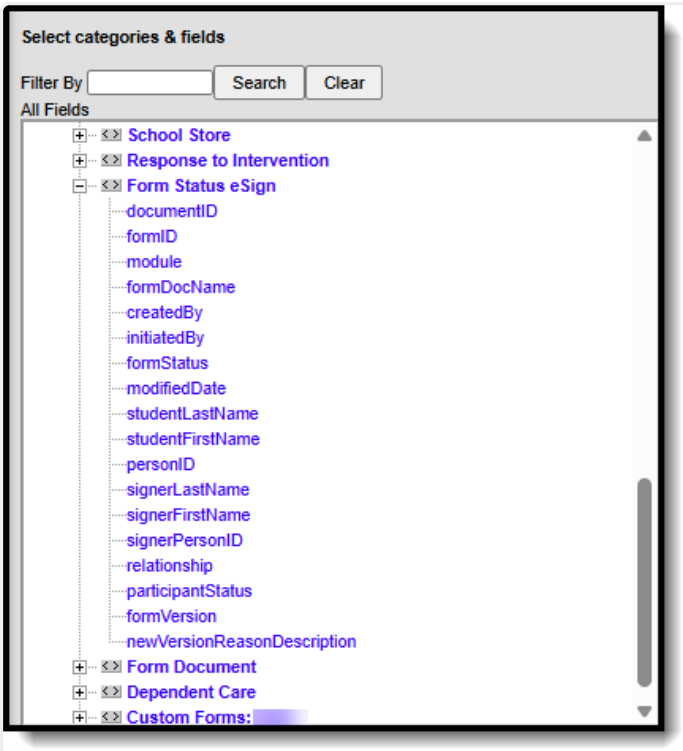
eSignature Contact Log

1. Click **Review Participants** after the eSignature request(s) have been sent.
2. Mark the checkbox for the person who was contacted.
3. Select the **Date** and **Time** when the contact occurred.
4. Select the **Contact Options** from the dropdown. This dropdown is populated from the Attribute Dictionary > ContactLog > Contact Type.
5. Enter a **Description** of the communication.
6. Click **Save Contact Log.** Multiple Contact Log records can be saved per form. Contact Log records can be created any time after the eSignature request(s) have been sent, including after the form is Completed.

eSignature Ad hoc Inquiries

Path: Reporting > Ad hoc Reporting > Filter Designer

Custom Forms with eSignature can be queried in Ad hoc at Student > Form Status eSign.



Form Status Ad hoc Folder

Ad hoc Field	Description
documentID	The unique identifier of the document.
formID	The unique identifier of the form.
module	The module where the form was set up.
formDocName	The name of the form.
createdBy	The name of the person who assigned the form to the student.
initiatedBy	Indicates who initiated the form: batch, staff, guardian, or student.
formStatus	The current status of the form. See the Status section of this article for available statuses.
modifiedDate	The day the form was last edited.
studentLastName	The student's last name.
studentFirstName	The student's first name.
personID	The student's personal identifier.
signerLastName	The last name of the person who signed or declined the form and/or terms and conditions.

Ad hoc Field	Description
signerFirstName	The first name of the person who signed or declined the form and/or terms and conditions.
signerPersonID	The personal identifier of the person who signed or declined the form and/or terms and conditions.
relationship	The relationship between the signer and the student
participantStatus	The participant status that displays in the UI (Review Participants side panel). See the Review Participants section of this document for participant statuses.
formVersion	The form version number.
newVersionReasonDescription	The form version description.

Delete

Click **Delete** Delete to remove a document from a person's record permanently. A warning displays confirming the action.

> Once an eSignature request has been sent, users cannot delete the form.

Copy

Click the **Copy** button Copy on an existing document to create a copy. A warning displays confirming the action. The user is automatically navigated back to the list screen, and the new copy of the document can be found with a date and timestamp of when it was created.

> Only existing forms can be copied. The document's name cannot be modified when making a copy.